

Resources Connection, Inc. (RGP)

Nasdaq; other; SIC 7389, Services-Business Services, NEC; CIK 0001084765

Resources Connection, Inc.	
RGP; other	
Grade	C A B C D E middle fifth of 336 graded peers percentile 49.3; sampling error 2.6 points; lower is stronger
Rank	166 of 336
Profitability	A percentile 16.3
Solvency	B percentile 34.1
Growth and financing	E percentile 91.7
Reliability	0.87 AUC filers with \$120M to \$591M assets; 95% interval 0.83 to 0.90; 206 events, 2020 to 2025
Peer failure rate	1.03% a year Item 1.03 bankruptcies, same asset band, 2012 to 2025
Size band	\$120M to \$591M assets total assets \$257.4M
Standard universe	inside revenue above \$1M and assets above \$10M
Warnings	none active not computable: distress, fortress balance sheet
Inputs computable	9 of 14
Graded from	filings received through Jul 24, 2026 77 days before the rescan; latest periodic filing 10-Q received Oct 7, 2026
Last close	\$2.98 2026-10-08; market equity \$103.6M
Price used in grade	None



C, the tortoise

middle fifth of its sector; letters are fifths of the 336 graded peers

Share price, twelve months to the rescan

split-adjusted close; the letter is fixed at the rescan that set it



Rescans on file: A/B from Aug 21, 2022, A from Aug 21, 2023, B from Aug 21, 2025, C from Aug 21, 2026

Letter at every rescan

Jan 21, 2012 to Oct 9, 2026; sector percentile, stronger toward the top; facts filed by each date only



Business, in the company's words

opening of Item 1 of the 10-K received Jul 24, 2026

Resources Connection, Inc. ("RGP," the "Company," "we" or "us") is a global professional services firm based in Dallas, Texas (with offices worldwide) with three decades of experience helping the world's top organizations navigate change and seize opportunity. With three integrated offerings-On-Demand Talent, Consulting, and Outsourced Services-the Company provides CFOs and other C-suite leaders with the flexibility to solve today's most pressing challenges. The Company's principal markets of

operations are North America, Europe & Asia Pacific.

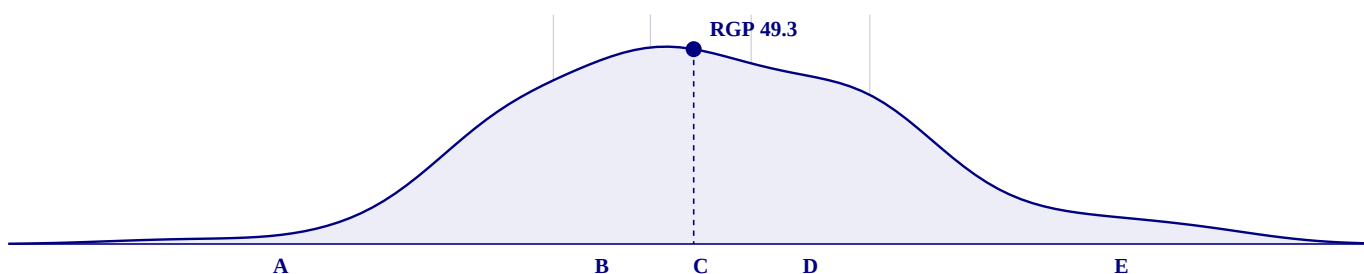
The fourteen inputs

lower percentile is stronger; equal-weighted sleeves

Input	Percentile, 0 to 100	Value	Peer median	Percentile	Peers	Period end
Profitability, sleeve percentile 16.3						
Gross profitability		65.9%	27.1%	9.4	289	2026-05-30
Return on invested capital		not computable	10.0%			one or more required annual facts are missing
Accruals ratio		(15.0%)	(5.9%)	17.2	506	2026-05-30
Gross margin stability, five years		1.1 pts	2.2 pts	22.2	204	2026-05-30
Solvency, sleeve percentile 34.1						
Twelve-month failure probability		not computable	0.04%			latest liabilities, cash plus short-term investments, book equity, and shares are required
Altman Z double-prime		1.43	2.05	48.3	386	2026-05-30
Net debt to EBITDA		not computable	2.52x			one or more required annual facts are missing
Interest coverage		not computable	2.18x			latest aligned inputs end 2023-05-27; latest annual assets end 2026-05-30
Current ratio		2.51x	1.32x	19.8	506	2026-05-30
Growth and financing, sleeve percentile 91.7						
Revenue growth, three-year compound		(16.5%)	5.1%	93.5	403	2026-05-30
Free cash flow growth, three-year compound		(80.2%)	8.7%	100.0	220	2026-05-30
Reinvestment rate		not computable	11.9%			pretax income must exceed the validity floor and imply a 0%-100% tax rate
Asset growth, three years		(21.5%)	4.1%	96.8	438	2026-05-30
Net share issuance, one year		3.3%	(0.4%)	76.3	356	2026-07-15

Among 336 peers

other; letters are fifths of this list



Composite score of every graded peer, smoothed; vertical rules are the letter band edges; stronger to the left.

Rank	Company	Percentile	Letter	Warnings
161	ICF International, Inc. (ICFI)	47.8	C	
162	Rollins Inc. (ROL)	48.1	C	
163	Jacobs Solutions Inc. (J)	48.4	C	
164	RB Global Inc. (RBA)	48.7	C	
165	Orion Group Holdings Inc. (ORN)	49.0	C	fortress
				balance sheet
166	Resources Connection, Inc. (RGP) <	49.3	C	
167	Mistras Group, Inc. (MG)	49.6	C	
168	Smart Sand, Inc. (SND)	49.9	C	fortress
				balance sheet
169	APi Group Corp. (APG)	50.1	C	
170	XPO, Inc. (XPO)	50.4	C	
171	Casella Waste Systems Inc. (CWST)	50.7	C	

What the price implies

at the 2026-10-08 close; none enters the grade

Measure	Value	Peer median	Percentile
Twelve-month price change, skipping the latest month	(14.2%)	2.0%	35
Distance from 52-week high	(43.4%)	(26.8%)	27
EBIT to enterprise value	not computable	4.4%	
Free cash flow yield	0.6%	4.1%	25
Book value to price	1.55	0.34	96
Sales to price	4.36	0.70	91
Composite equity issuance, five years	(17.7%)	(8.8%)	35
Relative strength against the sector, log excess return	(0.30)	(0.13)	35

Diagnostics

not in the grade

Measure	Value
Piotroski F-score None of 9, period end 2026-05-30	
Return on assets above zero	fail
Operating cash flow above zero	pass
Return on assets improved	pass
Operating cash flow exceeds net income	pass
Long-term leverage fell	fail
Current ratio improved	fail
No new shares issued	fail
Gross margin improved	fail
Asset turnover improved	pass
Cash, filings, liquidity	
Cash and equivalents	\$61.2M
Operating cash flow, four quarters	-\$9.6M
Months of runway	76.5
Days since last periodic filing	2 (10-Q received Oct 7, 2026)

Sources

each row links to the filing index on sec.gov

#	Concept	XBRL tag	Value	Period end	Received	Form	Accession
1	gross profit	us-gaap:GrossProfit	\$169.7M	2026-05-30	2026-07-24	10-K	0001084765-26-000051
2	assets	us-gaap:Assets	\$257.4M	2026-05-30	2026-07-24	10-K	0001084765-26-000051
3	net income	us-gaap:NetIncomeLoss	-\$40.6M	2026-05-30	2026-07-24	10-K	0001084765-26-000051
4	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$1.4M	2026-05-30	2026-07-24	10-K	0001084765-26-000051
5	assets	us-gaap:Assets	\$304.7M	2025-05-31	2026-07-24	10-K	0001084765-26-000051
6	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$452.0M	2026-05-30	2026-07-24	10-K	0001084765-26-000051
7	gross profit	us-gaap:GrossProfit	\$207.4M	2025-05-31	2026-07-24	10-K	0001084765-26-000051
8	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$551.3M	2025-05-31	2026-07-24	10-K	0001084765-26-000051
9	gross profit	us-gaap:GrossProfit	\$246.1M	2024-05-25	2026-07-24	10-K	0001084765-26-000051
10	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$632.8M	2024-05-25	2026-07-24	10-K	0001084765-26-000051
11	gross profit	us-gaap:GrossProfit	\$313.1M	2023-05-27	2025-07-28	10-K	0001084765-25-000115
12	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$775.6M	2023-05-27	2025-07-28	10-K	0001084765-25-000115
13	gross profit	us-gaap:GrossProfit	\$316.6M	2022-05-28	2024-07-22	10-K	0001084765-24-000089
14	revenue	us-gaap:RevenueFromContractWithCustomerExcludingAssessedTax	\$805.0M	2022-05-28	2024-07-22	10-K	0001084765-24-000089
15	current assets	us-gaap:AssetsCurrent	\$169.6M	2026-05-30	2026-07-24	10-K	0001084765-26-000051
16	current liabilities	us-gaap:LiabilitiesCurrent	\$67.5M	2026-05-30	2026-07-24	10-K	0001084765-26-000051
17	retained earnings	us-gaap:RetainedEarningsAccumulatedDeficit	-\$174.3M	2026-05-30	2026-07-24	10-K	0001084765-26-000051
18	operating income	us-gaap:OperatingIncomeLoss	-\$38.3M	2026-05-30	2026-07-24	10-K	0001084765-26-000051
19	book equity	us-gaap:StockholdersEquity	\$169.8M	2026-05-30	2026-07-24	10-K	0001084765-26-000051
20	liabilities	us-gaap:Liabilities	\$87.6M	2026-05-30	2026-07-24	10-K	0001084765-26-000051
21	operating income	us-gaap:OperatingIncomeLoss	\$72.8M	2023-05-27	2025-07-28	10-K	0001084765-25-000115
22	interest expense	us-gaap:InterestExpense	\$552,000	2023-05-27	2023-07-25	10-K	0001084765-23-000016
23	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$808,000	2026-05-30	2026-07-24	10-K	0001084765-26-000051
24	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$18.9M	2025-05-31	2026-07-24	10-K	0001084765-26-000051
25	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$2.7M	2025-05-31	2026-07-24	10-K	0001084765-26-000051
26	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$21.9M	2024-05-25	2026-07-24	10-K	0001084765-26-000051
27	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$1.1M	2024-05-25	2026-07-24	10-K	0001084765-26-000051
28	operating cash flow	us-gaap:NetCashProvidedByUsedInOperatingActivities	\$81.6M	2023-05-27	2025-07-28	10-K	0001084765-25-000115
29	capital expenditure	us-gaap:PaymentsToAcquirePropertyPlantAndEquipment	\$2.0M	2023-05-27	2025-07-28	10-K	0001084765-25-000115
30	depreciation amortization	us-gaap:Depreciation	\$1.3M	2026-05-30	2026-07-24	10-K	0001084765-26-000051
31	pretax income	us-gaap:IncomeLossFromContinuingOperationsBeforeIncomeTaxesExtraordinaryItemsDeductibleItems	\$38.1M	2026-05-30	2026-07-24	10-K	0001084765-26-000051
32	income tax	us-gaap:IncomeTaxExpenseBenefit	\$2.5M	2026-05-30	2026-07-24	10-K	0001084765-26-000051
33	current assets	us-gaap:AssetsCurrent	\$203.7M	2025-05-31	2026-07-24	10-K	0001084765-26-000051
34	current liabilities	us-gaap:LiabilitiesCurrent	\$75.4M	2025-05-31	2026-07-24	10-K	0001084765-26-000051
35	assets	us-gaap:Assets	\$510.9M	2024-05-25	2025-07-28	10-K	0001084765-25-000115
36	assets	us-gaap:Assets	\$532.0M	2023-05-27	2024-07-22	10-K	0001084765-24-000089
37	shares outstanding	dei:EntityCommonStockSharesOutstanding	34,443,626	2026-07-15	2026-07-24	10-K	0001084765-26-000051
38	shares outstanding	dei:EntityCommonStockSharesOutstanding	33,339,883	2025-07-18	2025-07-28	10-K	0001084765-25-000115